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automotive FLEET

THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS

$25

special edition

FACT BOOK

statistics
manufacturers
lessors
dealers
reference

1985 VOL. 24 SUPPLEMENT

automotive FLEET

THE MANAGEMENT MAGAZINE FOR CAR AND LIGHT TRUCK FLEET OPERATORS

Influencing over 3.4 million cars and 1.6 million light trucks and vans in leasing, rental, business, government, taxi, police, utility, and driving schools.

statistics

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1. statistics

FLEET FIGURES BY TYPE AND SIZE AS OF 1/1/85

CARS

Type of Fleet	Leased	Company-Owned	Employee-Owned	Total
Businesses with 25 or More Cars	2,014,000	232,000	344,000	**2,590,000**
Businesses with 10 to 24 Cars	297,000	158,000	294,000	**749,000**
Other				
Government (Federal, state, county, and local.)	78,000	450,000	—	**528,000**
Utilities	25,000	515,000	—	**540,000**
Police	3,000	225,000	—	**228,000**
Taxi	18,000	122,000	—	**140,000**
Daily Rental	55,000	700,000	—	**755,000**
Fleet Total	**2,490,000**	**2,402,000**	**638,000**	**5,530,000**
Individually-Leased (Lessors, either independent or dealers, leasing 1 to 9 cars as retail or consumer leases.)	1,657,000	—	—	1,657,000
INDUSTRY TOTAL	**4,147,000**	**2,402,000**	**638,000**	**7,187,000**

TRUCKS — CLASS I, II, AND III

Type of Fleet	Leased	Owned	Total
Businesses with 25 or More Light Trucks (Includes leasing, construction, plumbing, heating, food distribution, pest control, cable TV, etc.)	621,000	257,000	**878,000**
Businesses with 10 to 24 **Light Trucks**	167,000	85,000	**252,000**
Utilities	40,000	502,000	**542,000**
Government (Federal, states, county, and local.)	41,000	207,000	**248,000**
Other (Police, taxi, daily rental, etc.)	5,000	45,000	**50,000**
TOTAL	**874,000**	**1,096,000**	**1,970,000**

FLEET REGISTRATIONS BY MONTH AND YEAR

Totals include all fleets of 10 or more units.

	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984 +
JAN	81,419	93,226	111,651	117,455	136,778	117,135	110,666	93,700	100,500	141,669
FEB	61,590	85,445	103,849	117,726	118,112	97,789	100,205	78,300	91,200	142,006
MAR	79,099	90,890	102,672	124,982	127,114	118,773	108,836	84,500	105,800	136,526
APR	74,925	105,378	116,813	125,334	127,626	113,690	102,059	96,900	93,800	142,199
MAY	87,239	114,060	122,224	128,161	129,908	105,421	113,894	104,800	100,800	139,114
JUN	93,607	115,903	134,231	143,766	126,107	104,894	124,838	117,700	137,200	156,445
JUL	76,901	91,462	96,991	126,709	112,889	83,827	94,546	95,700	101,400	131,377
AUG	49,392	60,270	78,737	98,608	82,593	65,761	70,411	66,800	84,300	100,845
SEP	50,009	50,458	65,181	72,024	37,708	58,540	80,102	65,900	88,600	123,995
OCT	101,963	91,153	102,549	117,804	96,414	82,87	82,802	81,400	111,100	133,247
NOV	85,519	106,077	133,812	148,787	104,463	128,626	111,798	110,900	136,700	153,865
DEC	113,600	160,458	175,642	183,453	160,894	160,800	117,100	138,600	150,000	136,481*
Total	955,158	1,164,807	1,344,352	1,504,809	1,360,606	1,237,832	1,223,257	1,135,200	1,301 400	1,637,769

NEW FLEET VEHICLES REGISTERED

CARS — On all accounts buying 10 or more new units each year. — In Thousands

	1975	1976	1977	1978	1979	1980	1981	1982	1983	1984
Renting/Leasing	707	833	962	1,117	1,030	887	895	841	1,014	1,377
Commercial	150	181	205	216	211	207	215	185	194	249
R/L + Commercial	856	1,014	1,167	1,333	1,241	1,094	1,110	1,026	1,209	1,626
Government*	93	90	98	99	89	83	73	71	66	102
TOTAL	950	1,104	1,265	1,432	1,330	1,117	1,183	1,097	1,275	1,728

TRUCKS — On all accounts buying 10 or more new units each year. — In Thousands

Renting/Leasing	115	148	204	242	226	181	150	150	160	294
Commercial	127	152	200	231	246	199	182	147	144	218
R/L + Commercial	242	300	404	473	472	380	332	297	304	512
Government*	76	65	73	80	86	88	70	67	66	77
TOTAL	318	365	477	553	558	468	402	364	371	589

*Excludes Federal Government

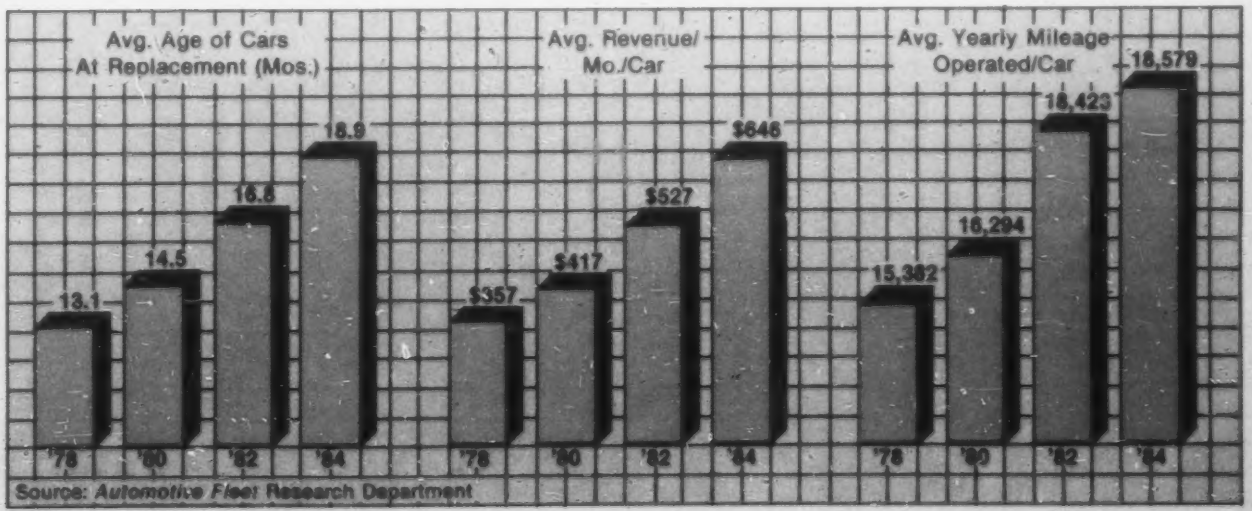
+ Estimated

U.S. DAILY-RENTAL MARKET PROFILE

Rank	Company	Number U.S. Cars	Percent On-Airport Market Share '83	'84	Estimated '84 Revenue
1.	Hertz	140,000	34%	33%	$900 million
2.	Avis	110,000	25	24	600 million
3.	National	100,000	19	20	550 million
4.	Budget	95,000	17	17	500 million
5.	Dollar	38,000	3	4	300 million
	Other On-Airport	32,000	2	2	100 million
	Total On-Airport	**515,000**	**100%**	**100%**	**2.95 billion**

Off-Airport Summary

FALS (Ford Dealers)	37,000		—
GM Dealers (not org.)	30,000		—
Enterprise	23,000		—
American International	20,000		—
Thrifty	20,000		—
Alamo	20,000		—
Agency Auto	18,000		—
Jiffy	18,000		—
DRAC (Chrysler Dealers)	18,000		—
Snappy	15,000		—
Ajax	15,000		—
Value	15,000		—
All Others	21,000		—
Total Off-Airport	**270,000**	**Total Off-Airport Revenue**	**$950 million**
TOTAL RENTAL MARKET	**785,000**		**$3.9 billion**

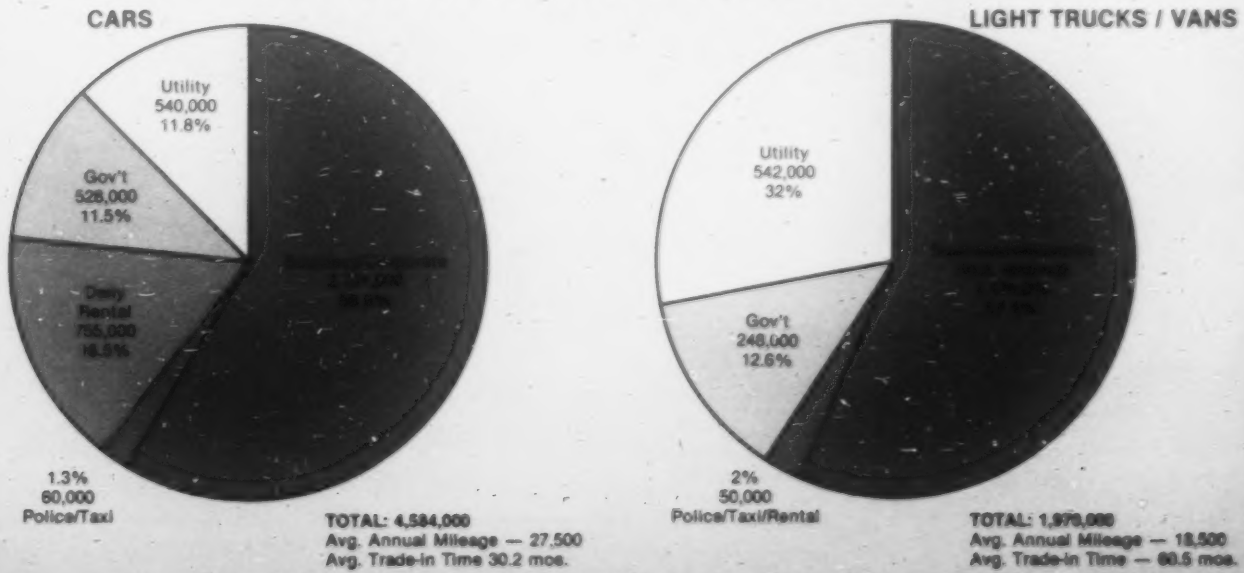


U.S. CARS IN FLEETS BY TYPE OF BUSINESS

TYPE OF FLEET	CARS (in Thousands)									
Business Fleets—25 or more	**1975**	**1976**	**1977**	**1978**	**1979**	**1980**	**1981**	**1982**	**1983**	**1984**
Salesman Owned	364	357	353	350	348	345	341	340	340	344
Company Owned	204	198	195	208	215	222	226	228	224	232
Leased by Companies (By Types of Lease)										
Finance & Management	1,262	1,391	1,412	1,540	1,580	1,588	1,617	1,525	1,553	1,545
Partial/Full Management	268	262	258	187	184	234	230	319	315	313
Net/Fixed	136	125	133	123	121	146	139	136	134	156
TOTAL Fleet Leased	1,666	1,778	1,803	1,850	1,885	1,968	1,986	1,980	2,002	2,014
Business Fleets—10-24 cars										
Owned	501	496	488	475	470	458	452	450	448	452
Leased	174	211	228	241	256	266	282	288	293	297
Individually Leased	1,072	1,217	1,335	1,610	1,690	1,708	1,713	1,645	1,653	1,657
Other Fleets										
Government	628	635	642	648	645	651	649	500	500	528
Utilities	497	508	518	523	529	532	537	530	533	540
Police	278	286	292	294	291	288	284	223	221	228
Taxi	193	202	202	205	207	205	198	141	139	140
Daily Rental	354	373	385	448	462	500	462	457	466	755*
Driver School	25	26	26	24	21	20	19	18	18	—**
TOTAL	1,975	2,030	2,065	2,142	2,155	2,196	2,149	1,869	1,877	2,191
NOTE: Number of Cars in Fleets of 4 or More	10,398	10,403	10,414	10,423	10,428	10,433	10,436	10,076	10,400	10,475
TRUCKS IN RENTAL (in Thousands, all GVW's)										
Daily Rental	157	155	158	182	194	195	193	188	191	198

Source: *Automotive Fleet* Research Department
* Major adjustment with new data ** Combined with Business Fleets

COMPOSITION OF THE *AUTOMOTIVE FLEET* FLEET/LEASING MARKET



1984 Model-Year Registrations

Fleet vs. Retail

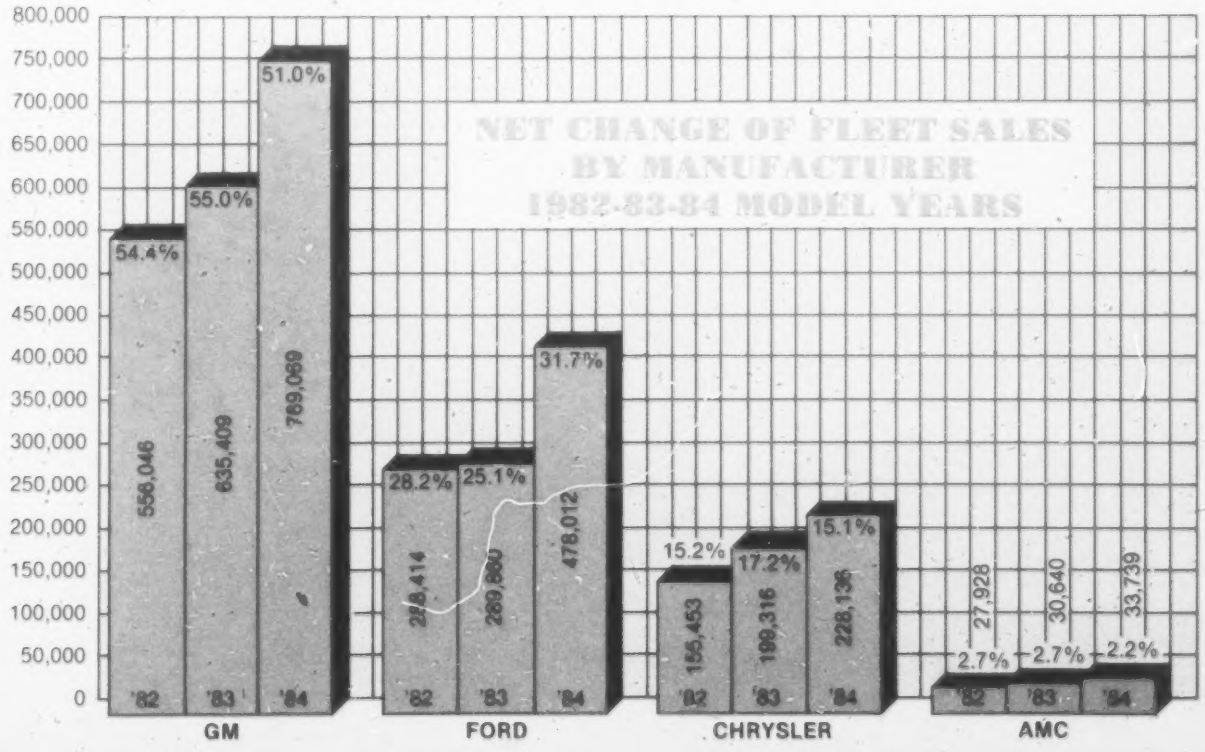
MODEL	Retail Totals	Fleet Totals	% Fleet vs Retail
SUBCOMPACT			
Encore	55,712	10,191	18%
Eagle Sedan	23,504	4,692	19
Alliance	105,272	18,856	17
Skyhawk/SW	103,433	8,299	08
Cavalier	312,243	44,895	14
Chevette	155,360	22,205	18
Omni	64,554	11,712	18
Escort	276,895	53,123	19
Mustang	95,287	26,661	28
Lynx	65,930	9,317	14
Capri	19,501	3,724	19
Firenza	50,837	6,467	13
Horizon	74,657	13,446	18
Turismo	45,146	3,244	07
T-1000	25,830	2,706	10
Rabbit	66,280	7,765	12
Total Subcompact	**1,540,441**	**247,303**	**16%**
COMPACT			
Skylark	81,035	18,758	23%
Citation	65,436	25,111	38
Aires	109,194	45,445	42
Tempo	171,175	78,137	46
Topaz	72,698	27,580	38
Omega	35,160	6,586	19
Reliant	139,194	61,833	44
Phoenix	12,144	3,455	28
Fairmont	1,380	445	32
Laser	50,444	4,672	09
Daytona	40,565	4,038	10
J-2000	105,734	13,583	13
Fiero	86,878	5,227	06
EXP	21,112	1,805	09
Total Compact	**992,149**	**296,842**	**30%**

MODEL	Retail Totals	Fleet Totals	% Fleet vs Retail
STANDARD			
LeSabre	140,016	18,302	12%
Impala/Caprice	202,990	55,182	27
Diplomat	21,207	11,679	55
LTD Crown Vic.	105,183	45,141	43
Gr. Marquis	128,601	14,826	12
Delta 88	223,787	31,409	14
Gran Fury	13,591	8,482	62
Parisienne	49,493	4,575	09
Total Standard	**884,868**	**187,596**	**21%**
INTERMEDIATE			
Regal/SW	160,438	42,980	27%
Century	157,122	42,146	27
Celebrity	208,140	91,202	44
LeBaron	94,173	17,011	18
"E" Class/NY	83,284	12,807	15
600	58,591	12,535	21
LTD/Granada	109,752	79,457	72
Marquis	94,743	18,745	20
Cutlass	258,071	74,159	29
Ciera	194,667	54,878	28
6000	86,758	33,786	39
Catalina/Bonneville	59,730	14,462	24
Monte Carlo	114,945	12,845	11
Thunderbird	113,487	37,941	33
Cougar	113,363	24,215	21
Gran Prix	69,693	9,185	13
Camaro	174,550	27,417	16
Firebird	93,013	10,026	11
Malibu	4,898	1,975	40
Total Intermediate	**2,249,424**	**617,794**	**27%**
LUXURY			
Corvette	24,200	3,859	16%
Electra LTD	71,982	11,647	16
Riviera	46,956	7,332	16
Seville/Cimarron	47,438	7,296	15
Fleetwood	160,195	27,195	17
Eldorado	60,644	10,480	17
Toronado	36,842	5,569	15
NY Fifth Ave.	76,256	8,043	11
Continental/Mark VII/Town Car	131,020	56,913	43
Total Luxury	**655,533**	**138,483**	**21%**
Total Domestic	**6,322,415**	**1,487,968**	**24%**
Total Import	**2,494,053**	**62,067**	**2.05%**
Total Industry	**8,816,468**	**1,550,035**	**17.8%**

FLEET REGISTRATIONS 1978-1984 MODEL YEARS

	1978	1979	1980	1981	1982	1983	1984
AMERICAN MOTORS	56,600*	53,668*	61,112*	42,022	27,928	30,640	33,739
	4.0%	*3.8%*	*5.4%*	*3.7%*	*2.7%*	*2.7%*	*2.2%*
BUICK	61,131	75,007	100,181	139,486	121,626	146,110	147,646
	4.3	*5.3*	*8.8*	*12.2*	*11.9*	*12.6*	*9.8*
CADILLAC	46,427	49,175	30,691	23,626	25,301	30,496	45,408
	3.3	*3.5*	*2.7*	*2.1*	*2.5*	*2.6*	*3.0*
CHEVROLET	349,762	377,469	285,758	262,572	214,275	222,404	284,690
	24.8	*26.5*	*25.2*	*22.9*	*20.9*	*19.2*	*18.9*
CHRYSLER	43,500	61,253	28,631	20,730	17,415	26,102	42,545
	3.1	*4.3*	*2.5*	*1.8*	*1.7*	*2.3*	*2.8*
DODGE	95,600	75,859	42,647	46,723	59,216	87,254	93,997
	6.8	*5.3*	*3.7*	*4.1*	*6.0*	*7.6*	*6.2*
FORD	310,522	281,078	239,354	213,801	186,500	176,739	322,710
	22.0	*19.7*	*21.1*	*18.7*	*18.3*	*15.3*	*21.4*
LINCOLN-MERCURY	137,952	138,805	76,871	97,626	101,914	113,121	155,302
	9.8	*9.7*	*6.8*	*8.5*	*10.0*	*9.8*	*10.3*
OLDSMOBILE	110,352	129,824	140,478	165,738	135,478	168,727	194,320
	7.8	*9.1*	*12.4*	*14.5*	*13.2*	*14.6*	*12.9*
PLYMOUTH	111,300	70,497	50,704	57,813	78,822	85,960	91,594
	7.9	*5.0*	*4.5*	*5.0*	*7.1*	*7.4*	*6.1*
PONTIAC	86,923	111,172	78,842	74,333	58,366	67,672	97,005
	6.2	*7.8*	*6.9*	*6.5*	*5.7*	*5.9*	*6.4*
DOMESTIC TOTAL	1,410,177	1,423,807	1,135,269	1,144,470	1,021,841	1,155,225	1,508,956
PERCENTAGE TOTAL	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

*Basic registration data is furnished by each manufacturer, and they may use differing bases. *Includes Jeep*



SIZE AND MODEL CARS PURCHASED BY MAJOR LEASING COMPANIES 1984 vs. 1983

SIZE AND MODEL
(In Percent)

Large	Standard	Intermediate	Compact	Subcompact	Imports
Electra	LeSabre	Regal	Alliance	Encore	All
Riviera	Impala	Century	Concord/Spirit	Skyhawk	Models
Coupe de Ville	Caprice	Monte Carlo	Eagle/SX4	Cavalier	
Sedan de Ville	Diplomat	Celebrity	Skylark	Chevette	
Cimarron	LTD Crown Vic	Camaro	Citation	Charger	
Fleetwood	Grand Marquis	Cordoba	Aries	Omni	
Eldorado Cpe	Delta 88	LeBaron	Laser	Colt	
Seville Sedan	Gran Fury	Mirada	Daytona	Sapporo	
Imperial		600/400	Fairmont	Challenger	
Fifth Ave.		LTD	Granada	Escort	
New Yorker		Thunderbird	Mustang	EXP	
Continental		Cougar	Topaz	Lynx	
Mark VI		Marquis	Zephyr	Capri	
Town Car		Cutlass Sup	Calais	LN7	
Olds 98		Cutlass Ciera	Reliant	Firenza	
Toronado		Firebird	Phoenix	Horizon	
Parisienne		6000		Turismo	
Catalina		Grand Prix		Colt	
Bonneville				T1000	
				J2000	
				Fiero	

COMPANY	YEAR	LUXURY	STANDARD	INTER-MEDIATE	COMPACT	SUB-COMPACT	IMPORTS
AUTOMOTIVE RENTALS, INC.	1984	4.5	9.5	58.0	22.0	5.0	1.0
	1983	5.5	9.9	53.1	25.5	5.2	0.8
AVIS CAR LEASING	1984	3.8	16.5	63.0	7.8	6.9	2.0
	1983	4.1	18.5	50.3	17.5	7.8	1.8
COMMERCIAL CREDIT/McCULLAGH	1984	5.2	13.2	56.5	13.6	8.4	3.1
	1983	5.9	13.2	51.6	16.5	8.8	4.0
DART & KRAFT PORTFOLIO	1984	3.3	7.3	59.2	18.2	10.2	1.8
	1983	1.5	8.3	58.0	25.1	6.6	0.5
GELCO	1984	2.3	8.6	46.3	34.2	7.8	0.8
	1983	2.0	6.8	32.2	52.1	6.0	0.9
HERTZ CAR LEASING*	1984	—	—	—	—	—	—
	1983	3.0	8.0	40.0	37.5	3.5	9.0
LEASEWAY TRANSPORTATION	1984	2.0	11.0	55.0	29.0	20.0	1.0
	1983	3.0	10.0	52.0	33.0	2.0	—
LEND-LEASE	1984	22.5		12.0	65.5		—
	1983	6.0	13.0	49.0	22.0	5.0	5.0
PETERSON, HOWELL & HEATHER	1984	1.5	3.9	53.1	34.2	6.5	0.8
	1983	1.2	5.3	43.2	42.7	6.0	1.6
U.S. FLEET LEASING	1984	2.0	26.0	60.5	7.0	3.0	1.5
	1983	3.6	20.5	38.2	33.1	3.5	1.1
WHEELS	1984	1.0	11.2	66.0	17.8	3.4	0.6
	1983	0.4	9.9	60.3	25.5	3.6	0.8

* *Including rental.*

AALA FLEET COSTS SURVEY FOR CLOSED-END LEASES

Comparative Analysis of Average Per Unit Per Month Costs Years 1984 and 1983

OPERATING COSTS:	1984	1983	Increase (Decrease) Amount	Percentage	Percentage of Total
Depreciation	$206.05	$173.40	$32.65	18.83%	85.1%
Repairs and maintenance	33.40	33.07	.33	1.00	.9
Insurance	16.57	13.15	3.42	26.01	8.9
License tags and taxes	8.90	7.93	.97	12.23	2.5
Interest	65.57	63.99	1.58	2.50	4.1
Delivery	1.09	1.96	(.87)	(44.39)	(2.3)
Total Operating Costs	**$331.58**	**$293.50**	**$38.08**	**12.97%**	**99.2%**
General and administrative	34.94	34.63	.31	1.00	.8
TOTAL COSTS	**$366.52**	**$328.13**	**$38.39**	**11.70%**	**100.0%**

	1984	1983	1982	1981	1980	1979	1978	1977
Total costs per month	366.52	$328.13	$320.32	$306.82	$276.29	$247.98	$228.31	$212.01
Avg. mos. in operation	29.9	30.2	28.1	27.3	27.4	26.6	26.3	26.1
Avg. annual mileage	34,923	29,770	34,646	31,894	34,591	28,952	30,609	28,568

Composition of the AALA Fleet

	Standard Models %	Intermediate Models %	Compact Models %	Air Conditioning %	Chevrolet %	Ford %	Lincoln/ Mercury %	Chrysler %	Pontiac %	Oldsmobile %	Buick %	Cadillac %	Others %	%/Chevy, Ford & Chrysler/Plym.
Averages—1984	19	57	24	96	26	13	3	6	5	13	18	1	15	45
Averages—1983	23	53	24	96	31	12	*	6	7	20	10	2	12	49
Averages—1982	23	51	26	94	32	11	*	5	8	18	12	3	11	49
Averages—1981	23	51	26	96	32	15	*	2	5	18	13	3	12	49
Averages—1980	32	48	20	96	40	15	*	1	6	14	9	2	13	56
Averages—1979	45	43	12	98	42	20	*	2	6	8	7	3	12	64
Averages—1978	48	44	8	93	44	16	*	3	4	9	4	6	14	63
Averages—1977	45	47	8	95	38	27	*	3	3	6	6	3	14	68

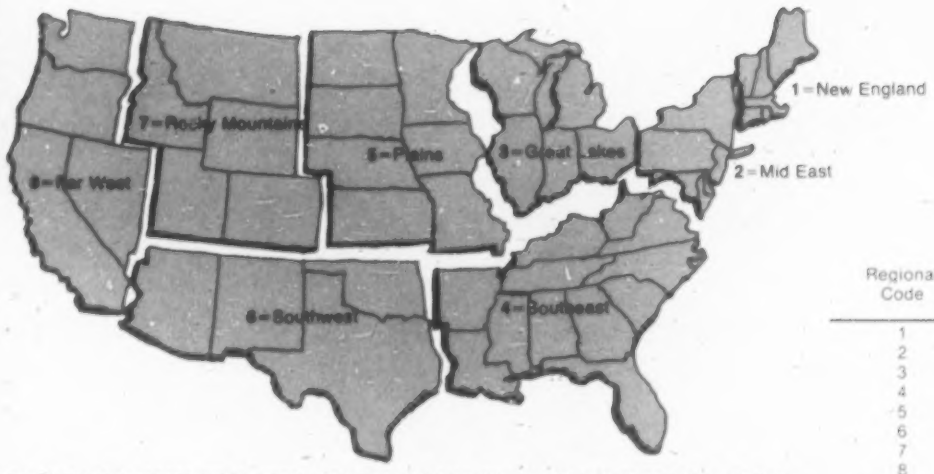
*Previously recorded in different category.

Used-Car Disposition

	RECONDITIONING		DISPOSITION					
	% of AALA Members Doing Recon.	Average Amount	New Car Dealer Sales	New Car Dealer Trades	Used Car Dealers	Auctions	Lessee Employees	Other/Retail
1984	—	—	9%	—	46%	16%	19%	10%
1983	73%	$287	6%	—	52%	10%	14%	18%
1982	66%	$224	8%	—	46%	16%	16%	14%
1981	80%	$241	6%	4%	46%	13%	16%	20%
1980	57%	$218	7%	1%	43%	20%	20%	9%
1979	60%	$185	5%	2%	51%	21%	12%	9%
1978	61%	$170	11%	1%	43%	19%	14%	12%
1977	65%	$147	10%	1%	48%	14%	18%	9%

Source: AALA Survey

FLEET-CAR OPERATING COSTS BY REGION



Regional Code	Running Expenses ¢/mile	Standing Expenses ¢/mile
1	7.83	306.09
2	8.31	283.70
3	7.66	284.30
4	7.87	273.92
5	7.77	292.06
6	8.45	271.81
7	8.55	261.54
8	8.44	292.73
USA	7.98	287.66

Notes: Running expenses are incurred when a car is being driven, and include gasoline, oil, tires, and maintenance. Standing expenses are incurred whether or not the car is used, and include such fixed costs as interest, insurance, and license fees. Data covers leased cars and company-owned cars, from December 1984 Fleet Composite information.
Source: Peterson Howell & Heather, Inc., Center for Analysis and Research, which maintains a computerized data base on fleet car costs for its clients.

NAFA PERSONAL-USE AND USED-CAR DATA

Reimbursement For Use Of Personal Car Mileage Only (No Assigned Fleet Car) U.S. Commercial Fleets Only

Amount	1980	1981	1982	1983	1984
15¢ or less	3%	1%	2%	2%	1%
16, 17, 18, 19¢	43%	13%	15%	11%	10%
20¢	43%	68%	69%	72%	56%
20½¢	*	*	*	*	22%
21, 22, 23, 24¢	11%	17%	10%	12%	10%
25¢ or more	**	**	4%	3%	1%

Notes: *Not broken out in surveys for those years but included in "20 cents a mile" figure.
**Not broken out previously, but included in the "more than 20 cents a mile" percentage.

Reimbursement For Use Of Personal Car Mileage Only (Assigned Fleet Car Not in Service) U.S. Commercial Fleets Only

Amount	1980	1981	1982	1983	1984
15¢ or less	4%	3%	5%	2%	1%
16, 17, 18, 19¢	43%	15%	13%	9%	8%
20¢	43%	66%	68%	73%	56%
20½¢	*	*	*	*	23%
21, 22, 23, 24¢	11%	17%	11%	14%	9%
25¢ or more	*	*	3%	3%	3%

Note: *Not broken out in surveys for those years but included in "more than 20 cents a mile" total.

Composite Commercial Fleet

Fleet Size	706 units
Cars Sold in 1984	226
Model Year Cars Sold	
1980 or earlier	7
1981	68
1982	95
1983	40
1984	16
Marketing Methods To Employees	72
Wholesalers	56
Used Car Dealers	20
Auctions	58
Trade-Ins	20

Summary of U.S. Commercial Fleets

Total Cars in Survey	
U.S. Commercial Fleets	101,039
Representative Leased Fleets	47,739
Sample of Owned Fleets	53,291
Average Months in Service	
All U.S. Commercial Fleets	30.2
Representative Leased Fleets	29.4
Sample of Owned Fleets	30.5
Average Miles When Sold	
All U.S. Commercial Fleets	57,732
Representative Leased Fleets	56,471
Sample of Owned Fleets	62,901

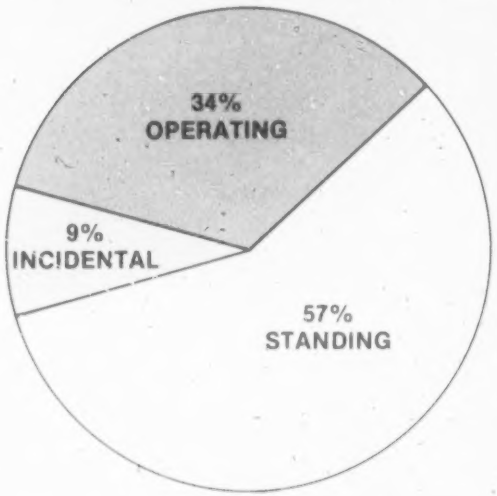
NAFA SURVEY OF OPERATING EXPENSES

Operating Expenses Comparisons Composite Fleets 1981-1983

	1981	1982	1983
Avg. Miles per Month	1,822	1,880	1,821
OPERATING EXPENSES			
(cents cost per car per mile)			
Fuel	.0745	.0643	.0579
Oil	.0012	.0011	.0016
Tires & Tire Repair	.0059	.0057	.0041
Repair & Maintenance	.0142	.0150	.0157
Total Operating Expenses	.0958	.0861	.0793
INCIDENTAL EXPENSES			
(dollar cost per car per month)			
License & Taxes	$ 6.23	$ 8.63	$ 9.95
Accident Repairs—Recoveries	8.65	7.39	8.85
Washing	5.04	6.14	4.12
Parking & Tolls	16.40	12.09	11.06
Miscellaneous	3.29	2.98	2.97
Total Incidental Expenses	$39.69	$37.23	$36.95
STANDING EXPENSES			
(dollar cost per car per month)			
Leasing Service Charge of Interest	$ 74.86	$ 76.38	$ 72.05
Depreciation Reserve	154.89	161.37	153.65
Depreciation Adjustment	– 17.56	– 23.00	– 12.38
Selling Expenses	1.35	11.38	5.04
Insurance	21.27	23.94	20.96
Total Standing Expenses	$234.81	$250.01	$239.32
CREDITS			
(Dollar return per car per month)			
Personal Use Credit	$ 41.48	$ 42.28	$ 47.70
NET EXPENSES			
(Incidental expenses plus standing expenses less credits)	$230.87	$244.96	$228.77

Source: NAFA's annual Survey of Operating Expenses, April 1984

Composite Fleet Breakdown of Expenses



Does not reflect personal use or equipment credits.

Operating Expense Comparisons 1981-1983

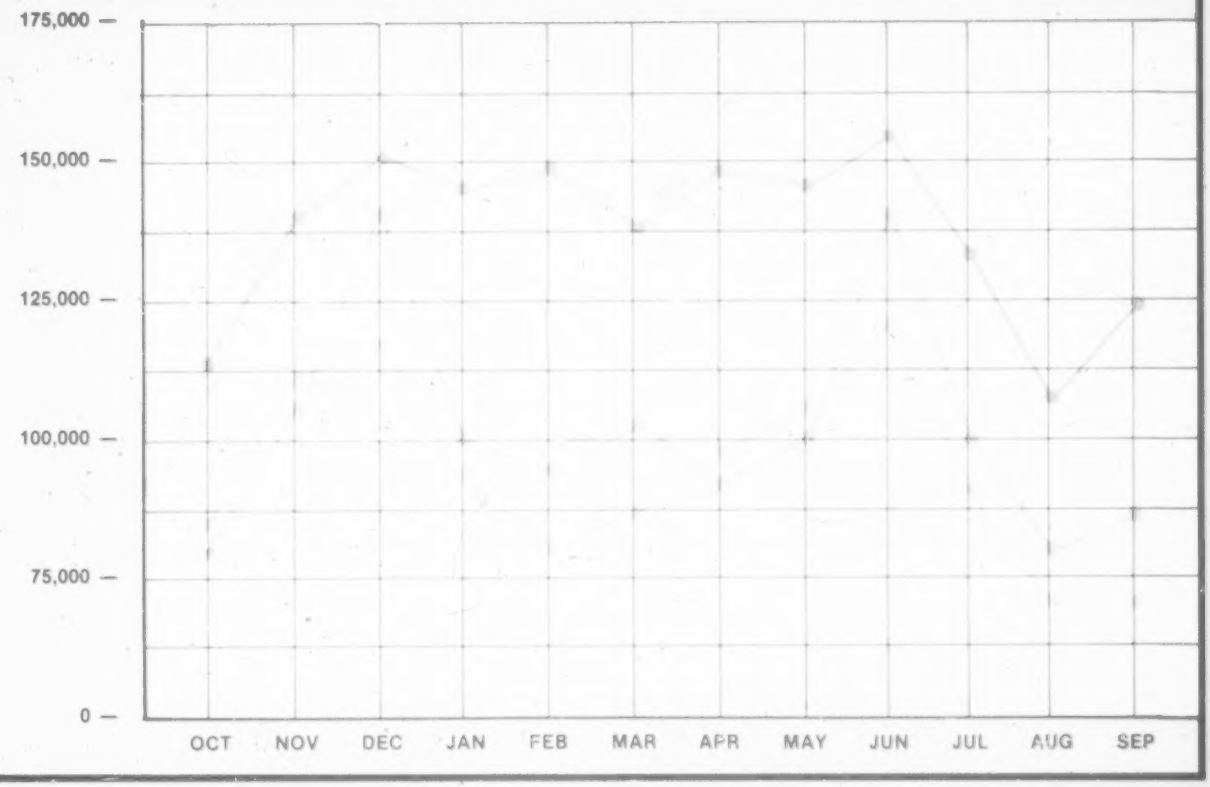
Mid-Size Cars

	1981	1982	1983
Avg. Miles per Month	1,799	2,027	2,236
Fuel	.0781	.0748	.0616
Oil	.0010	.0014	.0016
Tires & Tire Repair	.0061	.0053	.0064
Repair & Maintenance	.0118	.0105	.0169
Total Operating Expenses	.0973	.0920	.0865
Avg. price per gallon of fuel	$1.35	$1.36	$1.235
Avg. miles per gallon	17.3	18.2	20.05

Compact Cars

	1981	1982	1983
Avg. Miles per Month	1,794	2,339	2,153
Fuel	.0725	.0627	.0517
Oil	.0011	.0015	.0017
Tires & Tire Repair	.0052	.0040	.0035
Repair & Maintenance	.0123	.0112	.0126
Total Operating Expenses	.0911	.0794	.0695
Avg. price per gallon of fuel	$1.35	$1.36	$1.235
Avg. miles per gallon	18.6	21.8	24.1

Historic Fleet Registrations By Month & Model Year



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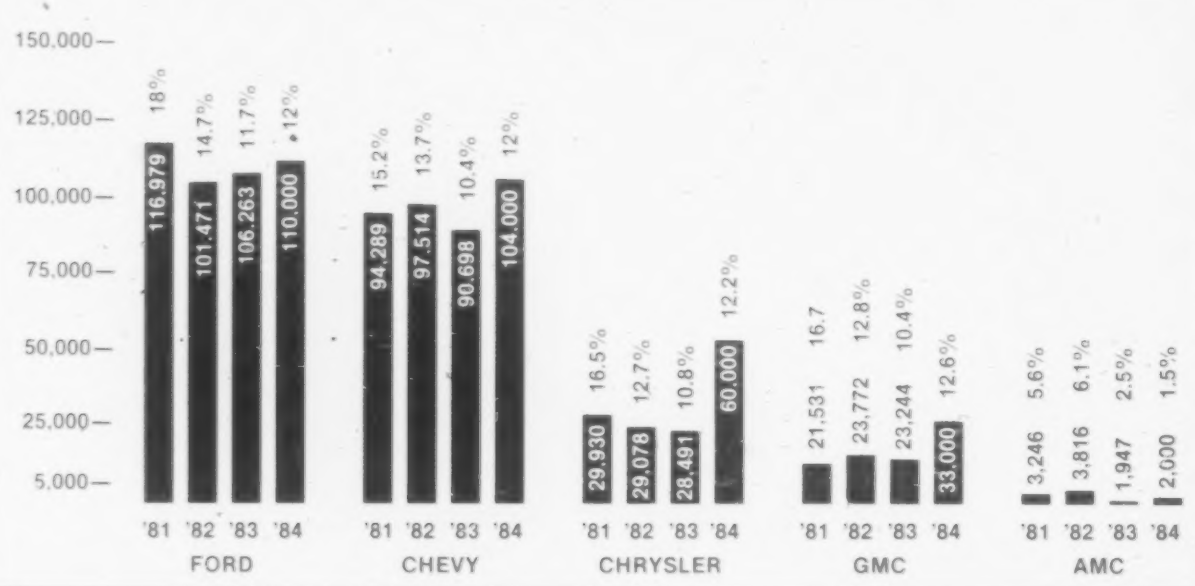
1981-1984 Light Truck *Fleet Sales* By Maker — Plus % of Retail

('84 Estimated — Extended from 7 Mo. Figures)



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U.S. Light Truck Statistics

New 1976 to 1984 Light Truck Registrations Reported — National and Fleet Totals — Class I & II

Source: Automotive Fleet Research Dept.

MAKE	1976	1977	1978	1979	1980	1981	1982	1983	1st 7 Mos. 1984
Total	2,693,646	3,069,482	3,518,374	4,065,190	2,749,051	1,926,887	2,237,843	2,339,897	2,151,595
Fleet	219,736	298,662	355,415	551,096	429,186	278,121	282,517	250,633	206,204
% Fleet	*8.2*	*9.7*	*10.1*	*13.6*	*15.6*	*14.4*	*12.6*	*10.7*	*9.6*
CHEVY	1,011,377	1,078,692	1,233,932	1,832,454	1,114,847	619,997	726,358	869,913	608,561
	78,625	103,727	123,369	156,170	117,983	94,289	97,514	90,688	73,353
	7.77	*9.62*	*9.99*	*8.52*	*10.58*	*15.2*	*13.4*	*10.4*	*12.1*
FORD	870,231	1,036,213	1,219,693	1,185,000	795,000	648,804	689,941	905,846	640,541
	77,661	105,721	124,823	284,000	206,700	116,979	101,471	106,263	77,037
	8.92	*10.20*	*10.23*	*24.00*	*26.00*	*18.00*	*14.7*	*11.7*	*12.0*
GMC	223,805	234,992	283,540	236,750	141,744	128,615	186,257	223,998	153,784
	15,251	21,618	27,552	30,591	23,486	21,531	23,772	23,244	19,453
	6.81	*9.20*	*9.72*	*12.92*	*16.57*	*16.7*	*12.8*	*10.4*	*12.6*
DODGE & PLYMOUTH	333,201	385,125	396,268	400,945	347,138	181,308	228,232	263,687	288,028
	31,694	40,823	41,603	48,794	52,731	29,930	29,078	28,491	35,231
	9.51	*10.60*	*10.50*	*12.16*	*15.90*	*16.50*	*12.7*	*10.8*	*12.2*
AMC/JEEP	95,506	115,079	161,912	140,431	77,852	58,257	62,097	76,453	80,421
	11,461	17,262	21,979	20,875	11,498	3,246	3,816	1,947	1,130
	12.00	*15.00*	*13.57*	*14.86*	*14.76*	*5.60*	*6.1*	*2.5*	*1.4*
OTHER Incl. VW, etc.	NA	NA	210,274	258,017	294,529	317,250	344,958	437,797	380,260

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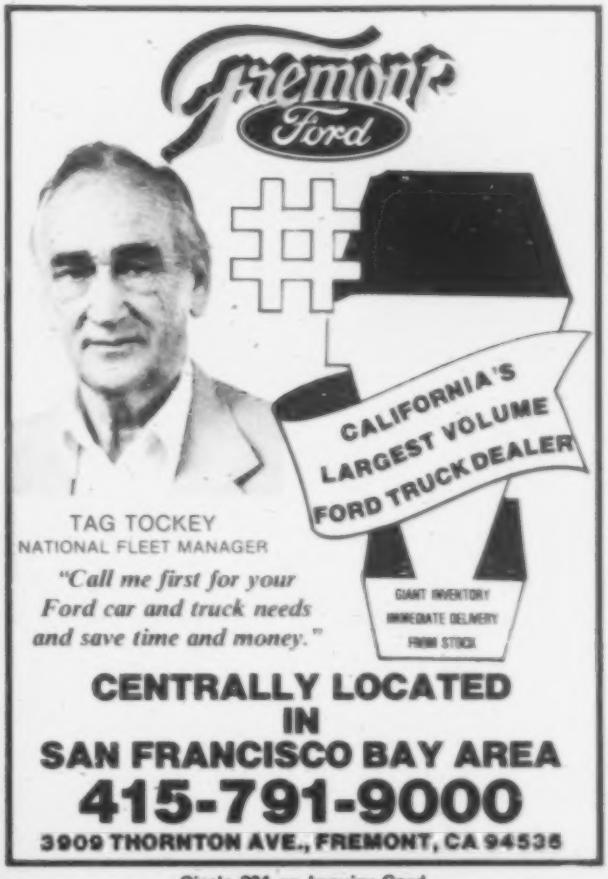
reference

Import Light Truck Market Statistics

New 1976 to 1984 Light Truck Registrations Reported
Class I & II National and Fleet Totals

Source: Automotive Fleet Research Dept.

MAKE	1976	1977	1978	1979	1980	1981	1982	1983	1st 9 Mos. 1984
TOYOTA									
1. Total	49,823	83,600	94,882	130,648	131,648	130,379	143,439	170,000	194,641
2. Fleet	27	2,526	10,966	4,620	8,731	5,874	10,936	23,387	31,767
3. % Fleet	*.01*	*3.02*	*11.55*	*3.53*	*6.60*	*4.50*	*7.6*	*13.8*	*16.3*
NISSAN/ DATSUN	71,902	102,071	87,645	104,866	113,242	119,684	106,440	132,088	147,753
	2,257	3,797	5,123	6,046	8,045	6,184	13,430	12,073	13,081
	3.13	*3.71*	*5.84*	*5.76*	*7.10*	*5.50*	*12.6*	*9.1*	*8.9*
MAZDA	3,032	1,318	4,708	8,302	8,775	16,798	40,661	75,751	90,585
							2,192	5,747	5,343
							5.3	*7.5*	*5.8*
ISUZU						9,959	17,669	26,211	27,528
								2,175	6,359
								8.3	*23.1*
MITSUBISHI							931	9,222	15,000
									2,400
									16.0
IVECO							2,563	2,800	2,550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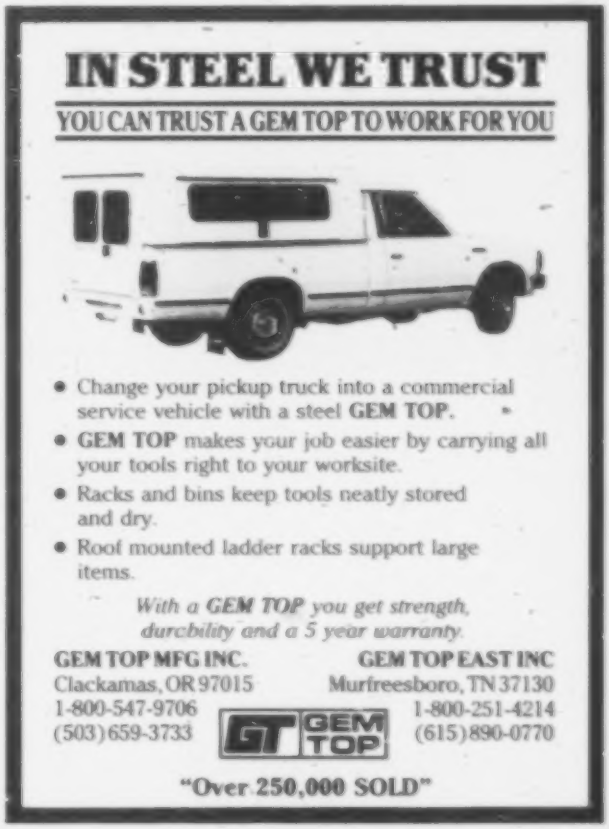
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Top Twenty-Five Utility Light-Truck & Van Fleets

'84	'83			
1.	1.	Southwestern Bell St. Louis, MO	Elizabeth Towns	16,216
2.	2.	Southern Bell T & T Atlanta, GA	Richard McDonald	12,500+
3.	3.	Pacific Bell San Francisco, CA	Roger Wesner	11,625
4.	4.	United Tele- phone System, Inc. Shawnee Mission, KS	Hugh Pilkenton	7,280
5.	6.	General Tel. of CA Pomona, CA	Del Wingert	5,825
6.	5.	New York Telephone Brooklyn, NY	Lindsay Payne	5,551
7.	7.	New England T&T Boston, MA	Mel Batchelder	4,485
8.	8.	Continental Telephone Atlanta, GA	George Wesner	4,271
9.	12.	Mountain Bell Denver, CO	Jerry Vegwert	3,500
10.	9.	Bell Tel. and Diamond State Tel. Philadelphia, PA	Will Biggs	3,380
11.	20.	General Telephone of Southwest San Angelo, TX	Paul Melton	3,045
12.	13.	Pacific N.W. Bell Seattle, WA	Pete Laburge	2,930
13.	14.	American Electric Power Service Canton, OH	Dick Stage	2,555
14.	16.	Southern California Edison — Rosemead, CA	Dennis Stewart	2,130
15.	17.	Pacific Gas & Electric Davis, CA	J. Roman	1,900
16.	15.	Consumers Power Co. Jackson, MI	John Schafer	1,705
17.	19.	Southern New England Telephone Co. New Haven, CT	G. Welker	1,650
18.	20.	General Public Utility Parsippany, NJ	Vincent Murphy	1,217
19.	—	Columbia Gas Dist. Co. Columbus, OH	Timothy L. Weber	1,206
20.	—	Public Service Electric and Gas Co. Newark, NJ	A.T. Ela	1,199
21.	—	Public Service Company of Colorado Denver, CO	R. Fields	1,120
22.	21.	Bell Telephone of PA Pittsburgh, PA	Roger Metzger	1,100
23.	22.	Michigan Consolidated Gas Company Detroit, MI	E.G. Morrison	1,038
24.	23.	Florida Light and Power Miami, FL	George Lindemeyer	986
25.	24.	Public Services Indiana Plainfield, IN	M.L. Hesson	599
TOTAL				93,346

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Top Twenty-Five Business/Commercial Light Truck & Van Fleets

'84	'83			
1.	1.	Sears Roebuck Chicago, IL	William Jones, III	13,000
2.	2.	Frito-Lay Dallas, TX	Gorman Green Marvin Crow Charles Loveless	12,266
3.	4.	Federal Express Corp. Memphis, TN	George Bollor	6,649
4.	7.	ARA Services Philadelphia, PA	Ralph Jamic	5,000
5.	—	Union Pacific System Omaha, NE	Don Dyer	3,900
6.	8.	Purolator Services New Hyde Park, NY	Jack Neusch	3,500
7.	9.	Standard Oil Co. (IN) Chicago, IL	Richard Swanson	3,500
8.	5.	Goodyear Akron, OH	A.P. Spencer	3,288
9.	22.	Rollins Inc. Atlanta, GA	Porter Thompson	2,978
10.	11.	Burlington Northern Railroad St. Paul, MN	John Long	2,900
11.	13.	Shell Oil Co. Houston, TX	J.A. "Judy" Wieman	2,850
12.	14.	Exxon Co. U.S.A. Houston, TX	Jack Lamb	2,800
13.	15.	Phillips Petroleum Co. Bartlesville, OK	J.I. Grillot E.A. Taylor	2,620
14.	12.	General Electric Major Appl. Bus. Group Louisville, KY	Mary Sue Leach V.J. Miska	2,600
15.	—	Westinghouse Louisville, KY	Lou Dobak	2,515
16.	18.	Canteen Corp. Chicago, IL	Mark Klein	2,500
17.	19.	Dow Chemical USA Midland, MI	Ron Smith Tim Sheehan	2,500
18.	16.	Johnson Controls, Inc. Milwaukee, WI	Bob Borchert	2,500
19.	20.	Union Carbide Corp. New York, NY	Walt Dzitko	2,500
20.	21.	Xerox Corp. Rochester, NY	Ron Pink	2,500
21.	23.	Honeywell, Inc. Minneapolis, MN	Connie Wesley	2,325
22.	24.	U.S. Steel Pittsburgh, PA	W.T. "Bill" Herlihy	2,200
23.	—	I.C. Industries Chicago, IL	E. Pierce Walsh Mary Anicich	2,010
24.	25.	Brown & Root, Inc. Houston, TX	Roger Ivey	2,000
25.	10.	Tenneco, Inc. Houston, TX	J.R. Jack Gudelman	1,945

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